

# WELCOME

Welcome to Butterfly Coaching Unlimited, LLC. I am very excited for us to start working together! I am attaching your Client Welcome Packet, which includes the following:

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- Client Agreement
- Client Intake Pack
- Coaching Success Guidelines
- Code of Ethics
- Coaching Disclaimer
- Payment Agreement

Please review the Agreement, complete the Client Intake Packet, and return it at least 24 hours before our first session.

Please do not hesitate to contact me if you have any further questions. I hope you are excited to begin, and I look forward to our first session.



# Coaching AGREEMENT

This Coaching Agreement for coaching services

**Dated**

The "Effective Date"

**is made between**

The "Coach"

**and**

The "Client"

will continue for a duration of 12 months, or until the client terminates the services (whichever comes first).

Coaching is a collaborative process with an ongoing relationship between the Client and the Coach. The coaching experience supports the Client in establishing new behaviours. The coaching relationship is strengths-based, forward-looking, and collaborative. The coaching agenda is developed and implemented in partnership between the Client and the Coach, with the role of the Coach being to help the Client progress toward achieving a goal.

- The Client and the Coach agree to engage fully in the coaching experience
- The Client recognizes that coaching is not therapy, counselling, or consulting

## 1 CONFIDENTIALITY

The Coach agrees to keep all conversations and information with the Client private and confidential, as allowable by law. No personal information will be shared with anyone without the Client's express permission. Exceptions may be made if there is an imminent threat of serious injury to oneself or someone else.

## 2 DATA SECURITY

You understand that the use of technology is not always secure and you accept the risks of confidentiality in the use of email, text, phone, WhatsApp, Skype and any other technology.

## 3 WAIVER

You hereby release, waive, acquit and forever discharge your Coach, any agents, successors, assigns, personal representatives, executors, heirs and employees from every claim, suit action, demand or right to compensation for damages you may claim to have or that you may have arising out of acts or omissions by yourself or by your Coach as a result of the advice given by your Coach or otherwise resulting from the coaching relationship contemplated by this agreement.

# Coaching AGREEMENT

You further declare and represent that no promise, inducement or agreement not expressed in this agreement has been made to you to sign this agreement. This agreement shall bind your heirs, executors, personal representatives, successors, assigns, and agents.

## **4 THE SERVICES**

By entering into this relationship, the Client and Coach acknowledge that the Client desires to make a behavioral change or some type of improvement in his or her life. Behavioral change often takes time to implement and sustain. The pace of change is uncertain and varies amongst individuals. As such, the Client and Coach agree to a minimum of a 3-month relationship.

## **5 COACHING SESSION PROCEDURES**

Coaching sessions may occur in person, by phone, through video conference, or over email, depending on the venue that works best for the Client and what coaching package is selected.

- The Coach and Client agree to adhere to established appointment times.
- The Coach and Client agree to begin and finish all appointments on time. If the Client is more than 15 minutes late to an appointment, the Coach will assume that the appointment is canceled and the Client will be responsible for the full coaching fee. If the Coach is more than 15 minutes late to an appointment, the Client may assume that the session is canceled and the Client shall not be responsible for any payment for that session.
- The Client agrees to cancel or reschedule an appointment at least 24 hours in advance, without a change fee. Any changes or cancellations within 24 hours are subject to a 50% cancellation fee.
- Sessions are by phone either via Skype, FaceTime audio, WhatsApp audio or by telephone direct. In all cases the client is responsible for calling the coach. The coach is open to other formats by mutual agreement. The Coach is responsible for ensuring that they are available for consultation at agreed times.
- The length of each session set by the client at the time of booking on the appointment booking platform and paid for accordingly at the time of booking. Sessions may over-run by mutual agreement and paid for retrospectively, but only if the Coach has no commitments immediately following the session.

# Coaching AGREEMENT

## **6 CANCELLATION POLICY**

Clients maintain the right to cancel payment at any time. Cancellation must be given in writing and received before the following month's billing cycle. If you need to cancel a session, please give 24 hours notice to reschedule the monthly session, or this session will otherwise be charged

## **7 COACHING FEES**

The fee for all coaching services will be charged at the time of session or monthly. This fee is payable using approved payment methods.

## **8 REARRANGING SESSIONS**

If the client needs to rearrange a coaching session, they should provide at least 48 hours notice. No refunds will be given to clients for unused coaching sessions unless 48 hours notice has been given. In exceptional circumstances the Coach may need to rearrange a coaching session. In those instances he will also give the client 48 hours notice where practical.

## **9 PURCHASING EXTRA SESSIONS**

Extra session purchases can be made online and can be made with the Coach of your choice. You will be contacted within 24 hours of your purchase to discuss your personal goals with your Life Coach.

## **10 CANCELLATIONS**

If the Coach fails to give you 48 hours' prior notice of any cancellation, you will be entitled to 1 extra hour of coaching, in addition to the session you missed. We require a minimum of 48 hours' prior notice of any cancellation of any coaching workshop sessions. If you fail to provide a minimum of 48 hours' prior notice, you will still be charged for the session slot. Any rearranged cancelled sessions will be at a time mutually agreed between you and the Coach.

## **11 EARLY TERMINATION**

In exceptional circumstances, such as illness or unavailability due to bereavement or other commitments, inappropriate behaviour by the client, actual or potential conflict of interest, or other reasons, the Coach can decide to terminate the service to the client early or refuse or be unable to provide further coaching sessions to the client. In such a circumstance the client will be given reasonable notice of termination by the Coach where practicable and will be refunded any advance payments made for coaching sessions not yet provided.

# Coaching AGREEMENT

## 12 VARIATION TO TERMS & CONDITIONS

Where an Initial Number of Sessions is agreed, any changes to these terms and conditions intended to take effect prior to the conclusion of those Initial Number of Sessions will only have effect if agreed by both the Coach and the client and confirmed by the Coach in writing by email or letter. In other cases, the Coach may change any of these terms or conditions including the Per Session Fee by giving the client one week's notice in writing by letter or e-mail of the change(s). If following receipt of such notification of change, the client no longer wishes to proceed with further coaching sessions, they may withdraw from the service immediately by giving notice in writing by email or letter and they will then be entitled to a full refund of any fees paid in advance for coaching sessions not yet provided. Such notice will be effective on receipt by the Coach

## 13 COMPLAINTS

If for any reason you are unhappy with the Coach, you may transfer to another Coach at any given time. In all circumstances, any sessions used with the previous Coach remain used. The Coach cannot prescribe treatment or diagnose medical conditions. They may at any time ask to consult with your doctor should any mental health or medical condition arise.

## 14 REFUNDS

If, for any reason, you are no longer able to complete any coaching sessions, there will be no refund given to include any outstanding sessions. If there are exceptions based on medical provisions, a refund may be reviewed for consideration. We'd like to ask you to provide proof from your doctor.

By signing below, you agree with the information laid out in this document.

**Signed:**

**Date:**



# Coaching Success GUIDELINES

## **The Coaching Process**

Life coaching will help you set your goals, identify what it is that is holding you back and teach you how to move past your fears. With life coaching services, you'll learn how to take immediate action and commit in times of uncertainty. It is the coach's objective to get the best out of you, while holding you accountable for achieving the goals you set

## **Client Expectations**

The client is expected to attend each agreed session on time and ready to act and shall hold themselves accountable for what they do and do not do to make sessions productive. They may need to be open to changes in their goals as the coaching journey progresses. Coaches shall ask difficult questions and expect the client to be open and honest in order for growth to take place. However, clients do maintain the right to decide which topics to cover and to terminate a topic if they choose that they no longer wish to discuss it further

## **Coach Expectations**

The coach is expected to listen to their client and their wishes, and work within that guideline where possible. Guidelines will be agreed prior to all sessions in order to ensure the client is aware of what behaviour will/will not be accepted. The goal of each session is to work through any setbacks that the client may currently be facing, clarify all goals through exercises and locate methods to move their client forward on their goals.

# Code of ETHICS

As your coach, I agree to:

- maintain a professional relationship with my clients at all times
- always keep my clients' interests above those of my own
- maintain, guard and guarantee my clients' confidentiality
- I not offer advice, counselling, or psychotherapy to any client in my duties as a coach
- develop lasting relationships built on a foundation of honesty, integrity and respect with every client I serve
- commit all of my professional experience, and focus to helping every client I serve
- expect success from every client I serve, and I will not be limited in my expectations by my clients' past performances
- encourage my clients to believe in themselves, set realistic goals, take appropriate actions and celebrate success
- provide my clients with a safe and nurturing coaching experience, which will allow them to be themselves without fear of judgment, criticism or failure
- remain committed to professional excellence in all that I do and all I provide



# Life Coaching QUESTIONS

## What is a Life Coach? \_\_\_\_\_

A life coach is a type of wellness professional who helps people make progress in their lives in order to attain greater fulfilment. Life coaches aid their clients in improving their relationships, careers, and day-to-day lives.

## What is the role of a Life Coach? \_\_\_\_\_

Life coaches can help you clarify your goals, identify the obstacles holding you back, and then come up with strategies for overcoming each obstacle. In creating these strategies, life coaches target your unique skills and gifts. By helping you to make the most of your strengths, life coaches provide the support you need to achieve long-lasting change.

## What happens during a coaching session? \_\_\_\_\_

Each session will begin with a review of the actions that were set in the previous session, and discuss where there has been progress. A goal for the session shall then be set and worked towards by using a number of techniques, which shall in turn generate options that may have not been previously considered.

## How long are Life Coaching sessions? \_\_\_\_\_

Life Coaching sessions last around 45-60 minutes, and these sessions can be arranged weekly or monthly.

## How many Life Coaching sessions will I need? \_\_\_\_\_

You are free to have as many or as few coaching sessions as you like. Many coaches operate over the phone or online, and therefore the sessions can easily fit around your schedule. Some people hire a coach once every few months, some people have a session once a week. It is entirely up to you to decide.



# Coaching DISCLAIMER

- I understand that the coaching services I will be receiving from my Coach are not offered as a substitute for professional mental health care or medical care and are not intended to diagnose, treat or cure any mental health or medical conditions. I also understand that my Coach is not acting as a mental health counsellor or a medical professional.
- I understand and agree that I am fully responsible for my well-being during my coaching sessions, and subsequently, including my choices and decisions.
- I understand that coaching is not a substitute for counselling, psychotherapy, psychoanalysis, mental health care or substance abuse treatment, and I will not use it in place of any form of therapy.
- I understand that all comments and ideas offered by my Coach are solely for the purpose of aiding me in achieving the defined goals I create with my Coach. I have the ability to give my informed consent, and hereby give such consent to my coach to assist me in achieving such goals and understand that results are not guaranteed.
- I understand that to the extent our work together involves career or business, my Coach is not promising outcomes included but not limited to increased clientele, profitability and or business success.
- I understand that my Coach will protect my information as confidential unless I state otherwise in writing. If I report child, elder abuse or neglect or threaten to harm myself or someone else, I understand that necessary actions will be taken and my confidentiality agreement limited in this capacity. Furthermore, if my Coach is ordered by a court to provide information or to testify, she will do so to the extent the law requires.
- I understand that the use of technology is not always secure and I accept the risks of confidentiality in the use of email, text, phone, Skype and other technology.
- I hereby release, waive, acquit and forever discharge my Coach, any agents, successors, assigns, personal representatives, executors, heirs and employees from every claim, suit action, demand or right to compensation for damages I may claim to have or that I may have arising out of acts or omissions by myself or by my Coach as a result of the advice given by my Coach or otherwise resulting from the coaching relationship contemplated by this agreement.
- I further declare and represent that no promise, inducement or agreement not expressed in this agreement has been made to me to sign this agreement. This agreement shall bind my heirs, executors, personal representatives, successors, assigns, and agents.